2

Getting Started Introduction

Revision Sheet

Revision No.	Date	Revision Description

2.0   Getting Started Introduction

Industry access to the Active Partners Performance System (APPS) is obtained via the internet, through the website of the Department of Housing and Urban Development (HUD). APPS is an automated management tool that utilizes the advantages of internet technology so that HUD may improve communication on policy and procedural matters throughout the Department, increases its management and oversight activities with its Industry business partners, and serves as a clearinghouse for Participant information.

APPS is accessed through the Secure Connections function. All internet systems within Multifamily Housing contain sensitive information and require User IDs and passwords to be authorized to change information.

Registration is required prior to gaining access to APPS internet application. Only after registering in HUD's Secure Systems, receiving a Coordinator/User ID by mail, and being assigned a system role, can an internet User access the APPS application.

Detailed steps and explanation of the Secure Systems procedures can be found in Chapter 3: Registration Process. The following steps outline the registration process:

Step 1 - Establishing Your Organization in APPS

✍   *Note: A good rule of thumb is if your company has filed a financial statement, then your company should be registered and all that is needed is a Coordinator or User ID.*

✍   If your company has never done business with HUD you need to register by clicking on the Business Partner Registration Link on the APPS Home Page at http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm

✍   After completing this screen, you will be able to access your information the next business day before applying for your Coordinator or User ID.

Step 2 - Registering for a Coordinator/User ID for a Company or Individual

✍   *Note: If you do not have a Participant Record in APPS, you must establish your identity within APPS before registering for a Coordinator or User ID. Please refer to Step 1*

✍   *If you have a participant record for all Address changes some proof of the new address must be sent to HUD. This could be in the form of a memo on the company letterhead, a lease agreement or any other documentation that shows the correct address for the participant.   Once your fax or email is received, HUD can correct the address.   The information can be sent via email to the apps mailbox listed on the*

APPS home page or faxed, Attn PPSD Division along with a cover letter stating the details of the request to 202-708-0684.

Types of Users in Secure Systems:

- **Coordinator:** Controls access to the system and performs system administration functions, such as retrieving IDs, and assigning rights to users. For more information please refer to Chapter 3 of the Online User Guide.

✍ *Note: The system limits each Business Partner to two Coordinators. It is recommended that the Business Partner Executive Director designate two Coordinators to ensure backup of daily system administration needs.*

- **User:** A User can be an employee of the Business Partner or a third party (e.g., CPA) authorized by the Business Partner's Coordinator to submit data for the Business Partner.

✍ *Note: Please use your parent company Tax ID when registering for Coordinatorship*

✍ *Note: Initial Coordinator Registration will only register one company/individual.*

✍ *Note: To request Coordinatorship for multiple companies/individuals, you must have first completed Steps 2 through 5 for your first Coordinatorship. You may then go directly to Step 6 to request additional Coordinatorships.*

- Register for Coordinator/User ID by selecting http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm
- Receiving Your Coordinator/User ID:
    - Allow two week to process the Coordinator ID request.
    - User registration applications are processed nightly. (Can only be retrieved by Coordinator)

Step 3 - Assigning yourself as a Coordinator

Once you have registered and have received your Coordinator ID, you will need to assign yourself as a Coordinator for the company/individual

- On the APPS Web Page http://www.hud.gov/offices/hsg/mfh/apps/appsmfhm.cfm
- Click Secure Systems Login
- Enter User name (which is your M ID) and Password (The password you selected during registration.)
- Click "OK"

- On the User Login Legal prompt screen, Click "Continue"
- Select "User Maintenance"
- Enter your Coordinator ID (M ID)
- Click on "Search for User"
- Select "Maintain User Profile – Actions" from the "Choose a Function" drop down menu
- Click "Submit"
- Check "COR – Coordinator" checkbox and "UPD- Update" checkbox
- Click "Assign/Unassign Actions"
- Select "OK". You have now assigned yourself as a Coordinator

Step 4 - Assigning yourself role and User roles

- On the "Secure Systems Main Menu", select "User Maintenance"
- Enter your "Coordinator ID" or "User ID" (M ID)
- Select "Maintain User Roles" from the " Choose a Function" drop down menu
- Click "Submit"
- Check "AUP– APPS Update" checkbox
- Click "Assign/Unassigned Action"
- Select "OK". You have now assigned yourself roles

✍ *Note: Please reboot your system at this point for your new assignments and roles to be activated.*

Step 5 - Assigning yourself rights to Company/Companies/Individuals

- From the Secure Systems Main Menu page, select "Participant Assignment Maintenance"
- Enter your User ID (M ID)
- Select "Assign Participant" from the "Choose a Function" drop down menu
- Select "AUP - APPS Update" from the Choose a Role section
- Select the company/companies/individuals you want to assign rights to from the Participant section (You can select multiple participants by using the Control key on your keyboard)
- Click "Submit"
- Verify the list of company/companies/individuals you are requesting relationships for
- Click "Confirm"
- Click "OK"

Step 6 - Registering Coordinatorship for multiple Companies/Individuals

✍*Note: You must complete Steps 2 through 5 before you can request
Coordinatorship for multiple companies/individuals.*

- From The "Secure Systems Main Menu", select "Business Partners Maintenance"
- Enter your User ID
- Select "Request New/Delete Existing Relationships" from the "Please enter a Function" drop down menu
- Enter the Taxpayer Identification Number (TIN)/Social Security Number (SSN) for the companies/individuals you would like to assign rights to
- Click "Submit"
- Verify names and addresses (To ensure activation keys are mailed to the proper address)
- Click "Confirm"
- Click "OK"

✍*Note: You will need to wait at least two weeks to receive your activation keys from HUD.*

- To activate your relationships:
    - From the Secure Systems Main Menu page, select "Business Partners Maintenance"
    - Select "Activate Relationships" from the "Please enter a Function" drop down menu.
    - Enter Activation Keys
    - Click "Submit"
    - Verify information
    - Click "Confirm"
    - Click "OK"

Step 7- Assigning yourself rights to Company/Companies/Individuals

- Repeat Step 5

Step 8 - Assigning the User System Roles by the Coordinator

- For the Coordinator to retrieve the User ID:
    - From the Secure Systems Main Menu page, select "User Maintenance"
    - Enter "First Name" and "Last Name" of the User
    - Select "Search Users"
    - Retrieve User ID
- To assign the User System Roles:
    - From the Secure Systems Main Menu, select "Participant Assignment Maintenance"

- Enter the retrieved User ID (M ID), select Assign Participant from the "Choose a Function" drop down menu
- Select "AUP/APPS Update"
- Select the company/individual you want to assign user roles to (You can select multiple companies/individuals by using the Control key on your keyboard)
- Click "Submit"
- Verify information
- Click "Confirm"
- Click "OK"
• The User will now be able to submit data for the company/individual.

2.1 Accessing the HUD Home Page

1. Open your Internet browser. The instructions in this guide reflect the HUD standard browser, Netscape Communicator 4.7.5. As such, some screens may appear differently if you are accessing APPS via another web browser.

2. Type **http://www.hud.gov** in the Netsite or Address field and press the Enter key. The HUD home page displays.

Figure 2-1: HUD Internet Home Page

2.2 Accessing APPS

2.2.1 To Access the APPS Login page:

1. Select the <u>Multifamily Industry</u> link under the Information for Housing Industry heading on the right-hand side of the HUD home page. The **Multifamily Industry** screen displays.

Figure 2-2: Multifamily Industry Screen

2. In the lower right-hand of the page under the Systems Just for you, select the Work Online/audience group matrix link, which will bring up the Systems for the Housing Industry screen.

3. Select the <u>Active Partners Performance System (APPS)</u> link. The **Active Partners Performance System (APPS)** home page displays.
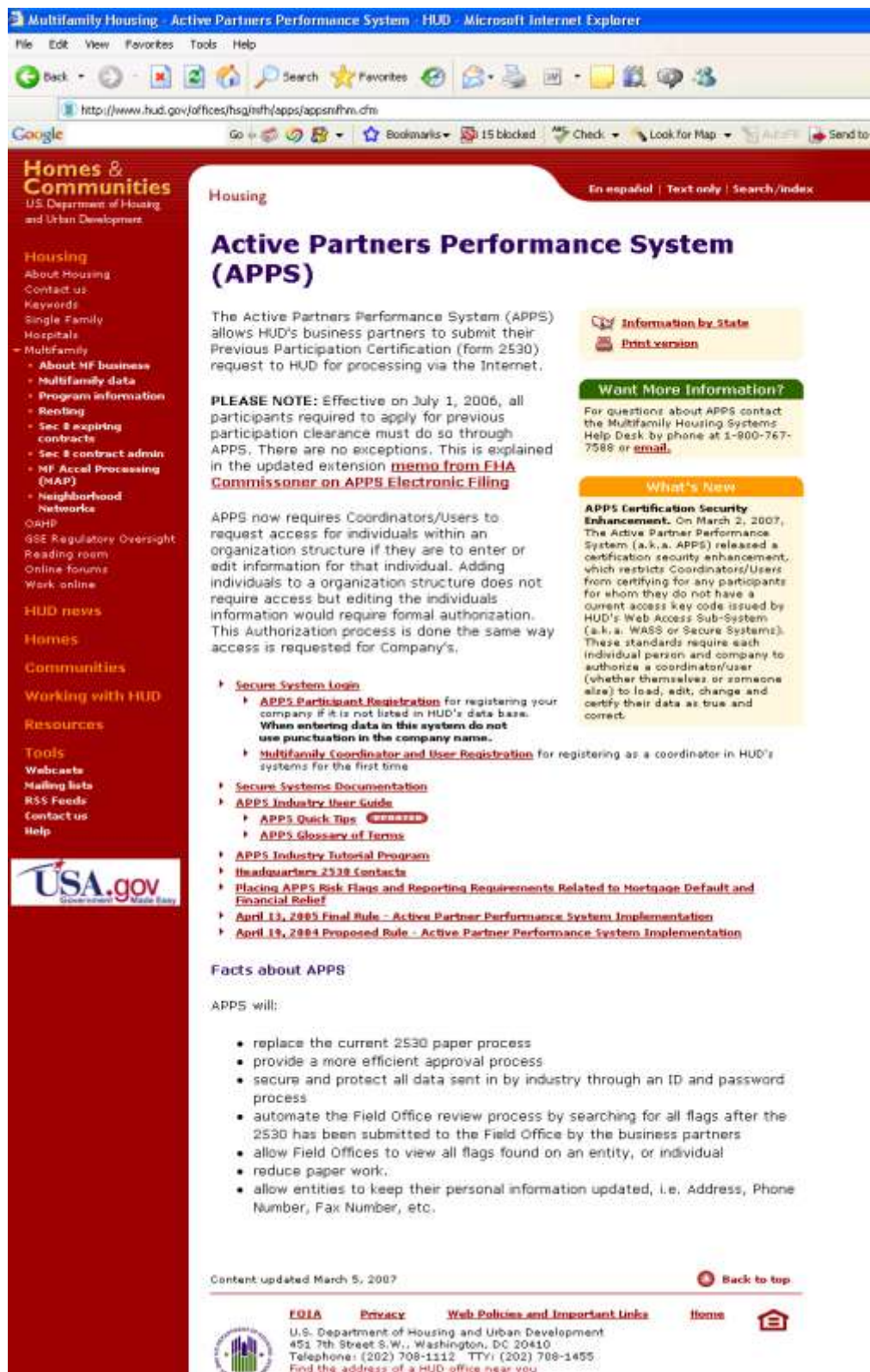
Figure 2-3: APPS Project Web Page

2.2.2 Accessing the APPS Home Page

Click on the Active Partners Performance System link on the **Secure Systems** home page. The **APPS home page** displays.

Figure 2-4: Active Partners Performance System Home Page

The Navigation Pane (sidebar) contains several useful links:

- By clicking the button from any screen within APPS returns you to the **Home Page.**

- By clicking the button, you can send an e-mail to the HUD Representative/APPS System Administrator with feedback about the system.

- Secure Systems – this link returns you to the Secure Systems logon page.

- Housing – this link takes you to the Office of Housing website.

- HUD Home – this link takes you to HUD's home page.

- HUD LDPs – the link allows you to view Limited Denial of Participation. Details on viewing LDPs can be found in Chapter 18.

- GSA EPLS – the link allows you to view the GSA Excluded Party List Search. Details on viewing GSA EPLS can be found in Chapter 18.

- 2530 Contacts – the link allows you to view the HUD contact name for your servicing Field Office.

- Online Help – Provides you help when working on a specific function.

- Glossary - Provides you a glossary of terms.